

# Tax Exempt Savings Plan



## Application Form

Please read the Key Information Document and Important Information section before completing this form. Please return your completed form to Foresters Friendly Society to proceed with your application. If you already have Tax Exempt Savings Plans (excluding NISAs) with this or any other Friendly Society, the total amount you can invest cannot exceed £25 per month.

### FOR OFFICE USE ONLY

Staff/FA/Int Name

Contact/FA/Int Number

Marketing Code

## 1. Your details

Complete in BLOCK CAPITALS in black ink

Title Mr  Mrs  Miss  Ms  Other

First name

Middle name(s)

Last name

Address

Postcode

Date of birth

(You must be aged between 16 and 80 to apply)

Your National Insurance (NI) Number

We require your NI number to process your application. It can be found on a payslip, form P45 or P60.

Home telephone

Mobile telephone

Email

If relevant, preferred branch no.

## 2. Regular contributions

### The amount you will be saving

The contribution level required for this plan is £25 per month.

### For how long do you want to save?

years  
(maximum 25 years, minimum 10 years)

### OR

The date that you want the plan to mature

(minimum 10 years from now).

### 3. How we will use your data

The information that you provide on this form will be held by Foresters Friendly Society. Further information about how we hold and use your personal information is available on our website ([www.forestersfriendlysociety.co.uk/privacy-policy](http://www.forestersfriendlysociety.co.uk/privacy-policy)).

We (Foresters Friendly Society, including your Branch) would like to provide you with marketing information about similar products and services which may be of interest to you. To consent to receive this, please select your preferred option(s) below:

Post     Email     Text Message (SMS)     Phone

Foresters Friendly Society will not share your data with third parties for their marketing purposes.

You can update your preferences at any time by calling 0800 783 4162, emailing [memberservices@forestersfriendlysociety.co.uk](mailto:memberservices@forestersfriendlysociety.co.uk), completing the online form available at [www.forestersfriendlysociety.co.uk/contactpreferences](http://www.forestersfriendlysociety.co.uk/contactpreferences) or writing to us at: Foresters Friendly Society, 29-33 Shirley Road, Southampton SO15 3EW.

### 4. Declaration

**This is our standard client agreement upon which we intend to rely. For your own benefit and protection you should read these terms carefully before proceeding. If you do not understand any point please ask for further information.**

**I wish to apply for the Foresters Tax Exempt Savings Plan:**

I have read and understood the Tax Exempt Savings Plan Key Information Document and Important Information section. I confirm that I am a UK resident (excluding Isle of Man and Channel Islands) and I declare that to the best of my knowledge and belief the statements provided on this Application Form are true and correct.

I declare that I do not have any other Tax Exempt Plans (excluding NISAs) with this or any other Friendly Society and that, by taking out this plan, my maximum entitlement of £25 per month to Friendly Society Tax Exempt Plans is not exceeded.

I understand that I will be entitled to Foresters Friendly Society surplus in the event of the closure of the Society only after having been a member for 5 years. I understand that a copy of the Rules and Memorandum are available upon request.

**I confirm that I have not been given advice by Foresters Friendly Society in relation to the purchase of this policy.**

Signature

Date



## 5. Instruction to your Bank or Building Society to pay by Direct Debit



### To The Manager

Name and full address of your Bank/Building Society branch.

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Name(s) of Account Holder(s)

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Sort Code

 -  - 

Account number

     

Originator's Identification Number 9 1 5 6 4 9

Reference Number (office use only)

         

### Instruction to your Bank or Building Society

Please pay Foresters Friendly Society Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Foresters Friendly Society and, if so, details will be passed electronically to my Bank/Building Society.

Signature  Date

Signature  Date

Banks/Building Societies may decline to accept instructions to pay Direct Debits from some types of account, such as a savings account.

## 6. The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Foresters Friendly Society will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Foresters Friendly Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Foresters Friendly Society or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Foresters Friendly Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written notification may be required. Please also notify us.

# Apply now for future peace of mind

## Send your completed application form to:

Foresters Friendly Society  
FREEPOST RLST-SJZE-BACC  
29-33 Shirley Road  
Southampton  
SO15 3EW

**Telephone: 0800 783 4162**

**Visit: [www.forestersfriendlysociety.co.uk](http://www.forestersfriendlysociety.co.uk)**

**Email: [memberservices@forestersfriendlysociety.co.uk](mailto:memberservices@forestersfriendlysociety.co.uk)**

Monday - Friday, 9am - 5pm (excluding Bank Holidays)

Information, including a copy of this document, is available in large print, audio and Braille upon request.

Foresters Friendly Society is the trading name of The Ancient Order of Foresters Friendly Society Limited which is an Incorporated Friendly Society (Registration No. 511F) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Registration No. 110029).